

SESSION ID 103250

Great Ways for Users to Navigate Today's PeopleSoft

MAY 8, 2023

SCOTT CRUTCHFIELD

PeopleSoft

RECONNECT

AT BLUEPRINT4D

LIVE!

Agenda



- Industry Direction – Oracle's Message
- Great Ways for Users to Navigate PeopleSoft
- Q&A

GT eForms™ - Validated PeopleSoft
Automation Solution

PeopleSoft Project Services

AI Digital Assistants

Process Optimization Analysis

PeopleSoft 'Keep Current'
Services

Full-Stack Cloud Managed Services

Automation Centers of Excellence

Integrated / Automated Testing – PeopleSoft
and Beyond

Robotic Process Automation



Giving Your Enterprise a Voice

Delivering on the Promise of Technology

Gideon Taylor enables clients to envision and create custom solutions for eForms and workflow technology, OCI cloud hosting, UiPath RPA, always-current managed services, full-service consulting and staffing, WebUX and conversational AI.

Founded in 2001, based in American Fork, UT

Gideon Taylor is a PeopleSoft custom solutions provider for business, education, and government organizations.

ORACLE

Partner



Oracle's Message

Investment in PeopleSoft Continues



No Plans to end investment or support
Premier support “through at least” 2034
Rolling 10+ years of Premier Support

Lifetime Support Policy

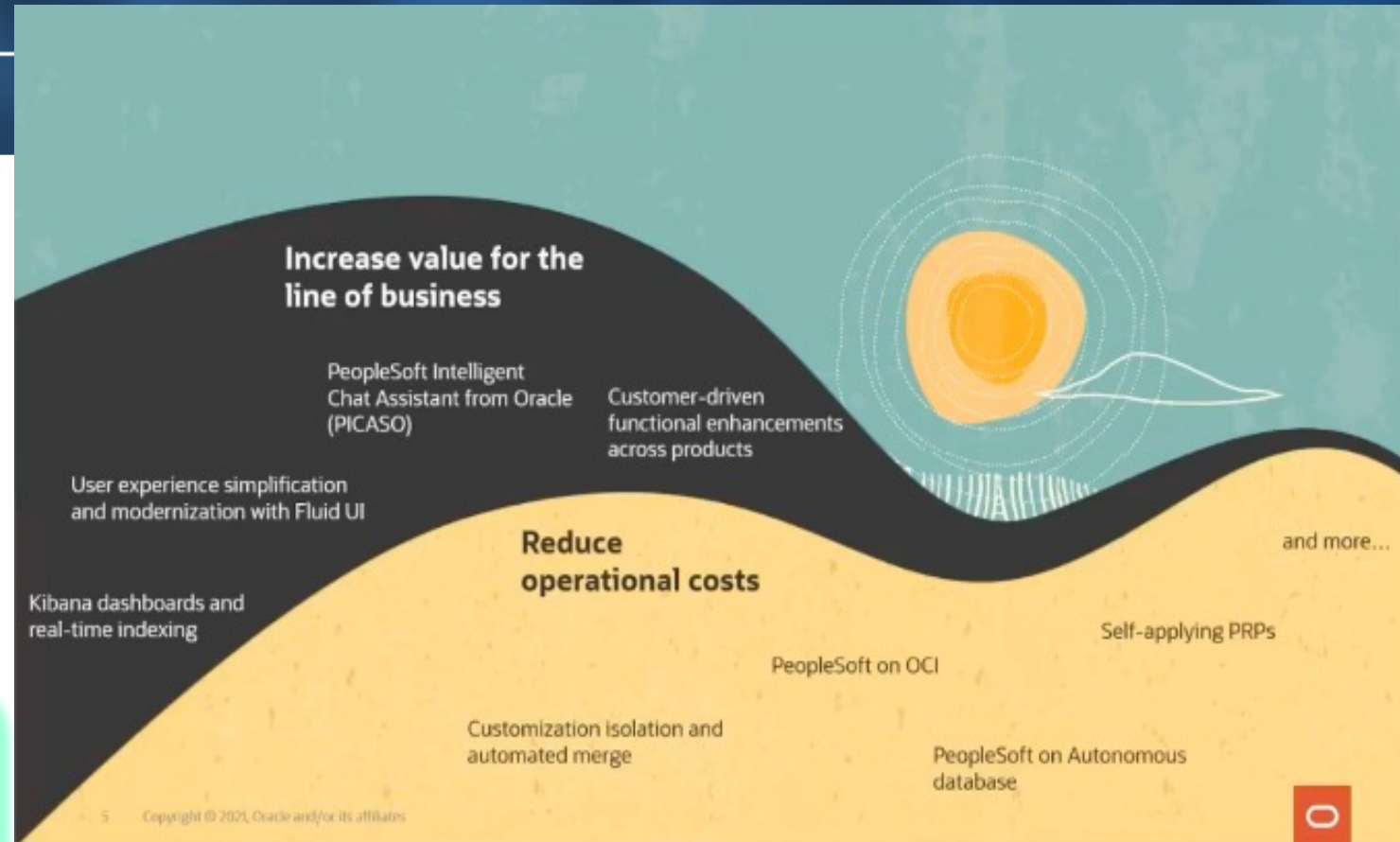
Expect lifetime support

Simple, predictable, and flexible—enjoy the benefits of the industry's most comprehensive support coverage.

Oracle's Message

- PeopleSoft has already addressed User Interface challenges – ALL Fluid Now!
- PeopleSoft is completely Cloud Ready
- Oracle's update strategy for PeopleSoft will continue to release valuable features that are easy to adopt

Are YOU using all of this?



Today's PeopleSoft

- Simple, Intuitive, Mobile User Experience
- Agile Innovation of Business Functions
- Low Cost, Responsive Development Operations

Our View:

- Easy to configure PeopleSoft usability
- Easy to add visual, actionable elements
- Users can achieve more results in less time

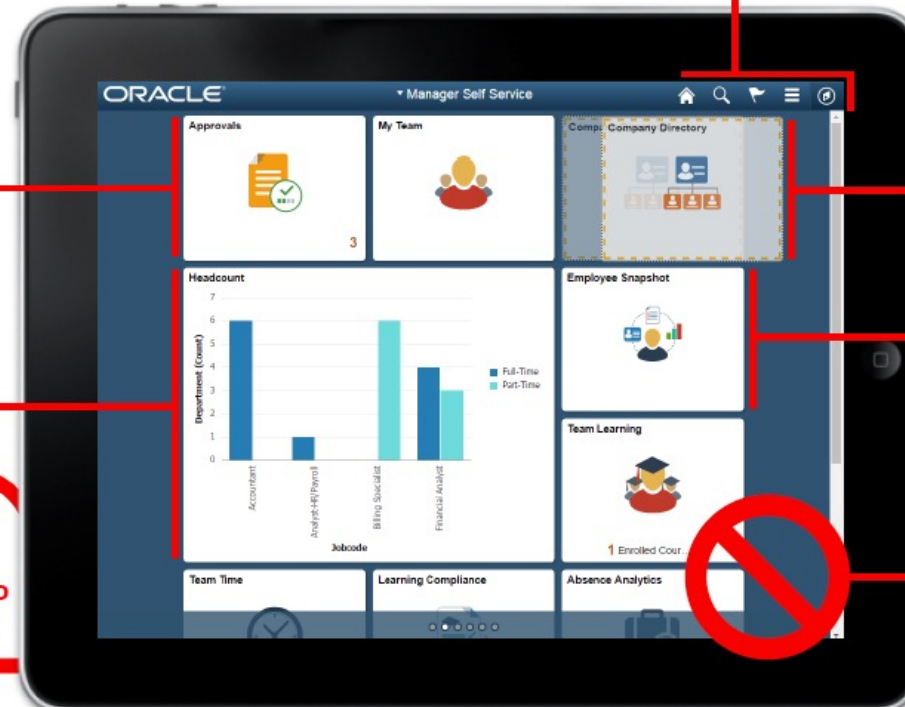
The Future is Now

Today's PeopleSoft Has Come a Long Way

Intuitive, Mobile User Experience

Actionable, Embedded Analytics

Deployment to Oracle Cloud



Global Search, Alerts, Notifications

Flexible and Personalizable

Selective Adoption of New Features

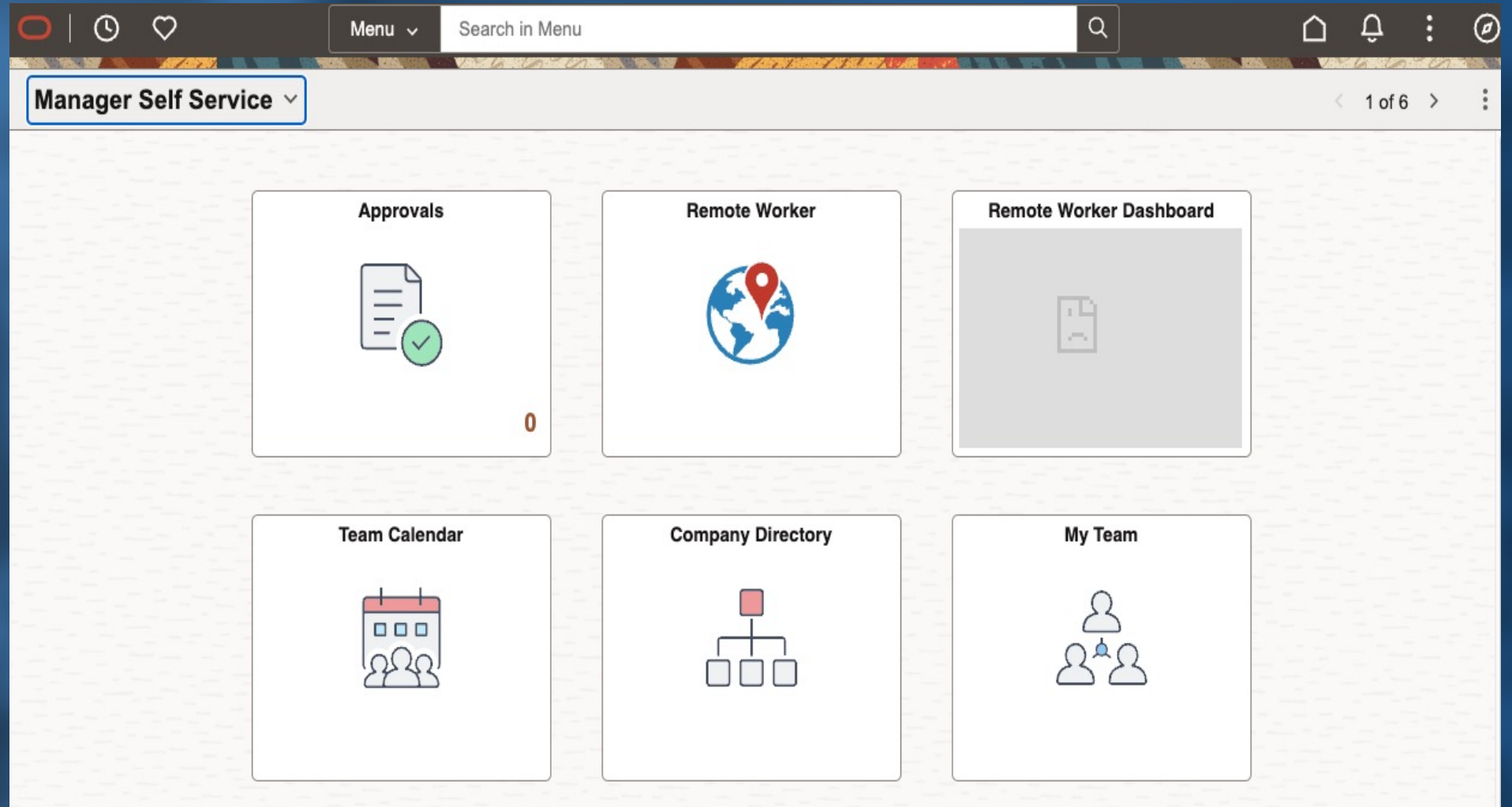
No Applications Upgrades Needed

Today's PeopleSoft

Look
Familiar?

Feel
Productive?

There's a
Better Way!



PeopleSoft

RECONNECT
AT BLUEPRINT4D *LIVE!*

PeopleTools – Key Features

<u>PeopleTools Release</u>	General Availability Date	Patches and Platform Certifications Through (12 mo after GA of next release)	CPU Delivered Through	Key new Frameworks
PeopleTools 8.51	September 10, 2010	October 28, 2013	October 28, 2014	<u>WorkCenters</u>
PeopleTools 8.52	October 28, 2012	February 1, 2014	February 1, 2015	Pivot Grids
PeopleTools 8.53	February 1, 2013	July 11, 2015	July 11, 2016	Activity Guides
PeopleTools 8.54	July 11, 2014	September 4, 2016	September 4, 2017	FLUID, Homepages, Tiles
PeopleTools 8.55	September 4, 2015	June 9, 2018	June 9, 2019	Simplified Analytics, Elastic Search, PeopleSoft Cloud <u>Mgr</u>
PeopleTools 8.56	June 9, 2017	September 21, 2019	April 30, 2021*	Classic+, PTF Query based Testing, Unified Navigation, PUM enhancements
PeopleTools 8.57	September 21, 2018	December 18, 2020	December 18, 2021	Personal Analytic Notification, Related Content Analytic Pane, Drop Zones, Kibana Support
PeopleTools 8.58	December 18, 2019	<i>April 8, 2022</i>	<i>April 8, 2022</i>	Chatbot support, enhancements everywhere
PeopleTools 8.59	April 8, 2021	<i>October 15, 2023</i>	<i>October 15, 2024</i>	<i>Search Centric, Menu Search, Real Time Indexing, Notification Panel</i>
<u>PeopleTools 8.60</u>	October 15, 2022	<i>8.61 release + 12 mo.</i>	<i>8.61 release + 24 mo.</i>	<i>Global Search, Notifications, Configurable Search, Lifecycle Management & Integration Enhancements</i>

What's Important to Users?

What improvements to our Business Processes should we focus on?

Productivity

Productivity = Work Completed / Time

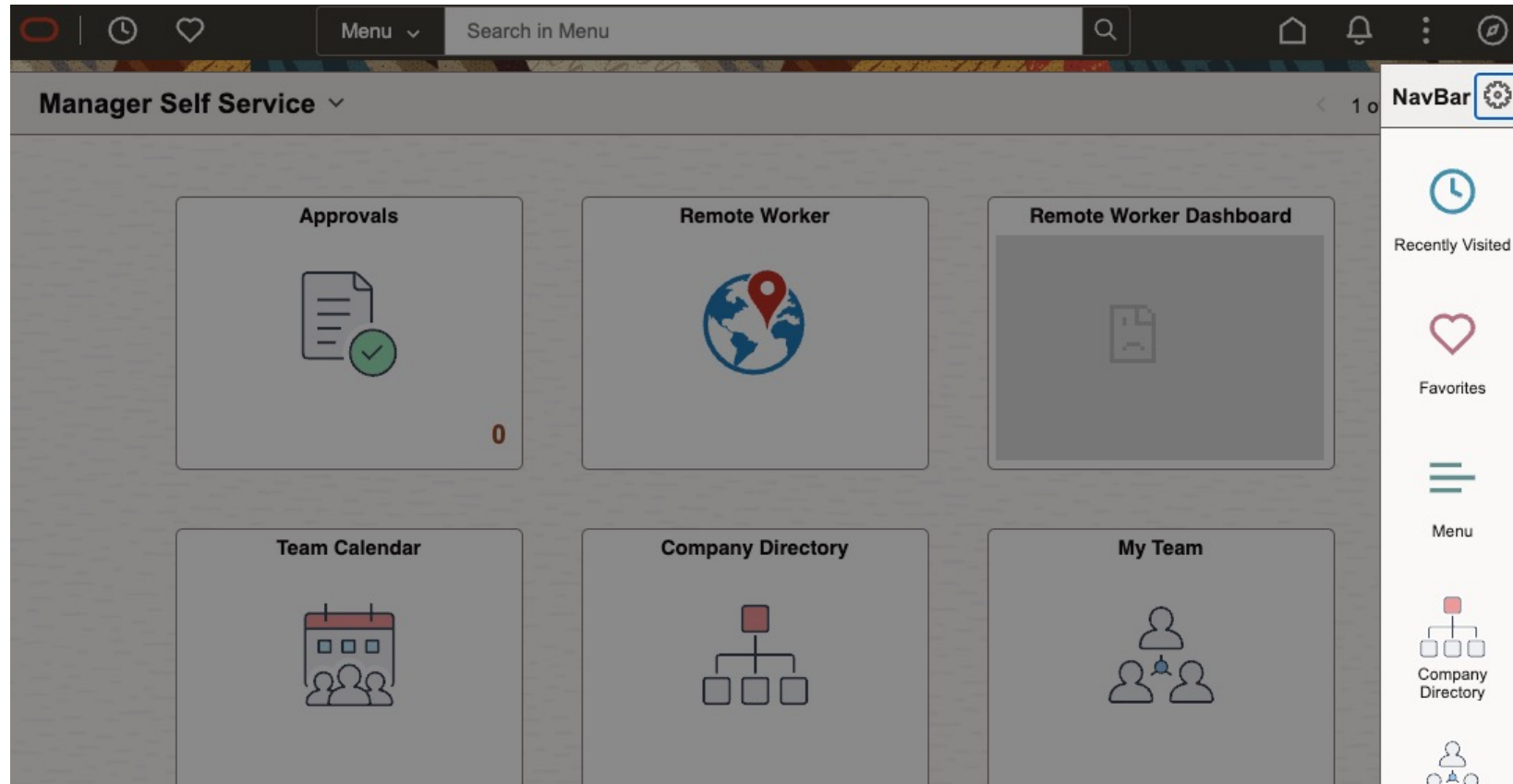
Efficiency

Efficiency = Work Completed / Energy Used

Enjoyment & Satisfaction!

Navigation Enhancements – 8.60

- UI Changes
 - Global
 - Contextual
- Quick Access Bar
 - Recently Visited
 - Favorites
- Global Search
 - All pages
 - Home - Expanded
 - Dashboard, Transaction – Muted
- Configurable Search
 - Reduce dependency on App Designer
- Mark Notifications
 - Mark Complete Button

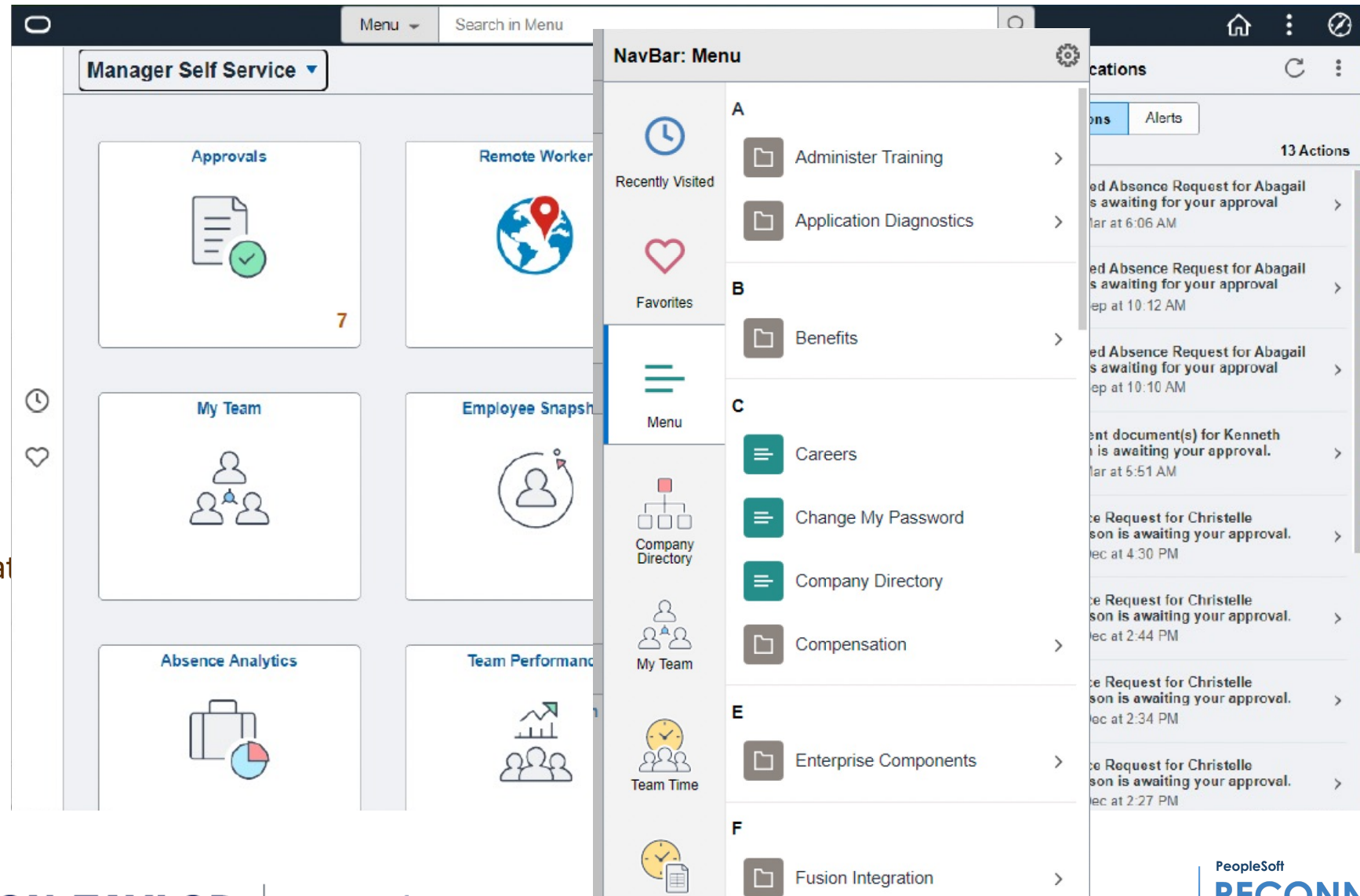


Navigation Enhancements – Homepage Optimization

- Quick Access Bar
 - Recently Visited
 - Favorites
- Notifications Panel
- NavBar & Menu Improvements
 - Menu Item Labels & Descriptions
- Global Search
- Real-time Indexing

Find the data and actions that are most important to each user

Use Search for primary navigation



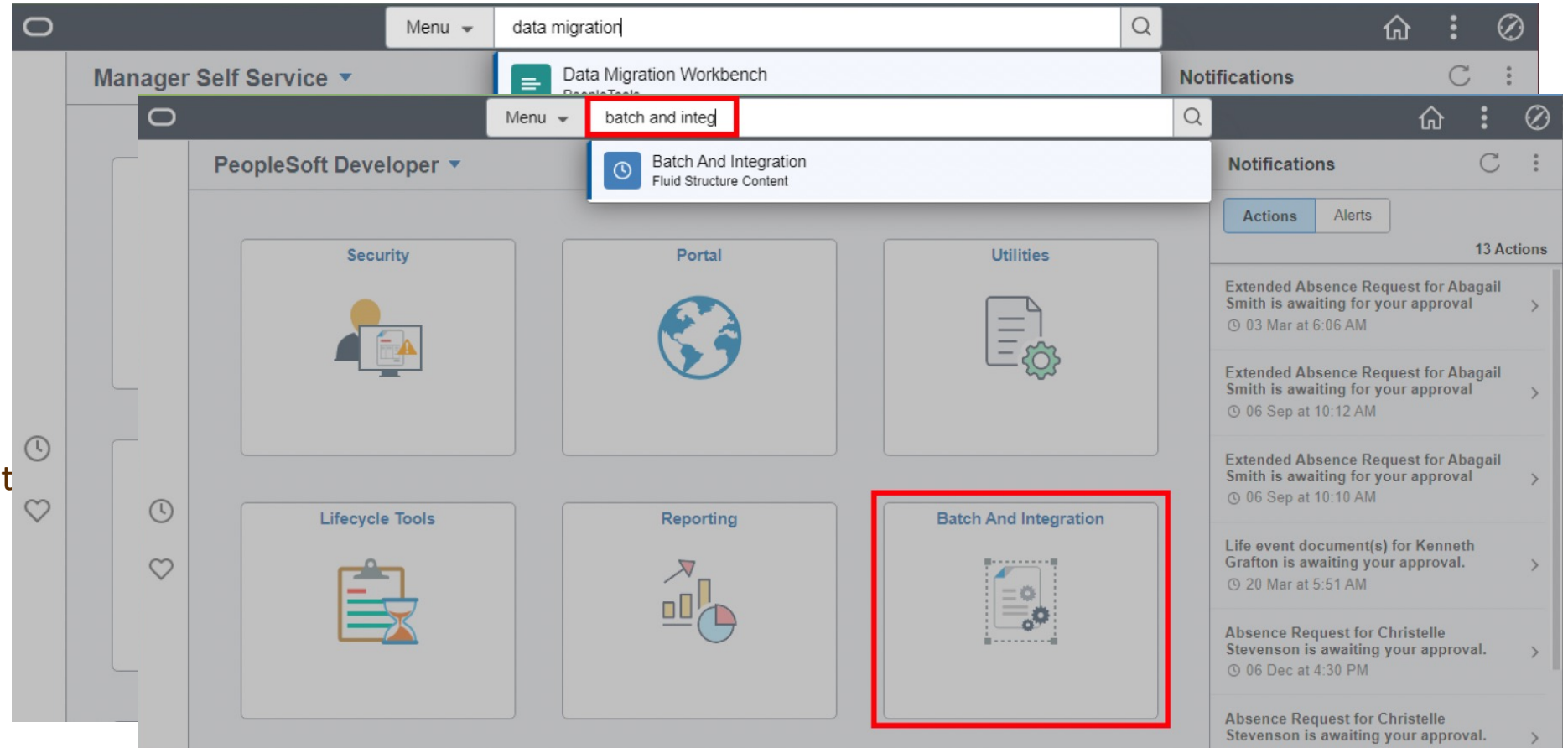
Navigation Enhancements – Homepage Optimization

Search First! Menu Search, Component Search, Keyword Search, Search Suggestions

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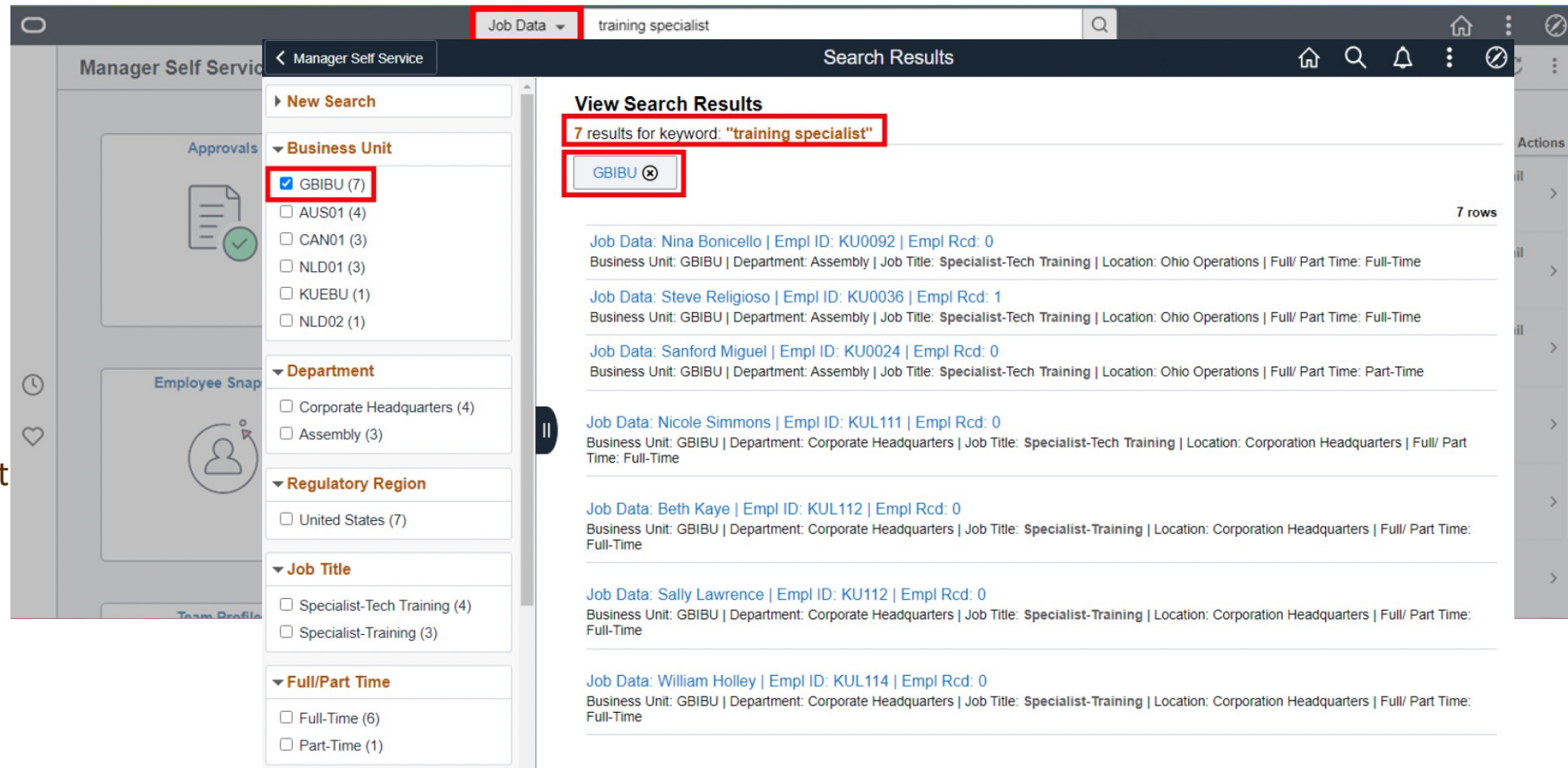
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Find the data and actions that are most important to each user

Use Search for primary navigation

The image displays two screenshots of a software interface demonstrating search suggestions.

Left Screenshot: Menu Search
 Search term: user profiles|
 Suggestions from current user recent access:
 - User Profiles (PeopleTools)
 - Review User Profiles (eSettlements)
 Suggestions from other users recent access:
 - Purge Inactive User Profiles (PeopleTools)
 - User Profiles (Enterprise Components)
 - Customer Registration Setup (Set Up Financials/Supply Chain)
 - Review User Profiles (eSettlements)
 - Qualification Profiles (Set Up Financials/Supply Chain)
 Suggestions from menu:
 - Qualification Profiles (Resource Management)
 - Qualification Profiles (Maintenance Management)
 - Distributed User Setup (PeopleTools)
 - Map User Profile Properties (PeopleTools)

Right Screenshot: Job Data Search
 Search term: training specialist|
 Suggestions from current user recent keywords:
 - Job Data: Mary Anne Rogers | Empl ID: KC0037 | Empl Rcd: 0
 - Job Data: Maarten de Graaf | Business Unit: NLD01 | Department: Education Services Netherlands | Job Title: Speci...
 Suggestions from application data:
 - Job Data: Nina Bonicello | Empl ID: KU0092 | Empl Rcd: 0
 - Job Data: Steve Religioso | Empl ID: KU0036 | Empl Rcd: 1
 - Job Data: Marcus Brown | Empl ID: KA0010 | Empl Rcd: 0
 - Job Data: Mary Anne Rogers | Empl ID: KC0037 | Empl Rcd: 0
 - Job Data: Ahmed Abd El Aoi | Business Unit: NLD01 | Department: Administration | Job Title: Specialist-Training | Loc...
 - Job Data: Karen Rudniski | Empl ID: KC0036 | Empl Rcd: 0
 - Job Data: Barry Campbell | Empl ID: KC0015 | Empl Rcd: 0
 - Job Data: Sanford Miguel | Empl ID: KU0024 | Empl Rcd: 0
 - Job Data: Eline Blom-Heijstee | Empl ID: KNG016 | Empl Rcd: 0
 - Job Data: David Holley | Empl ID: KA0004 | Empl Rcd: 0

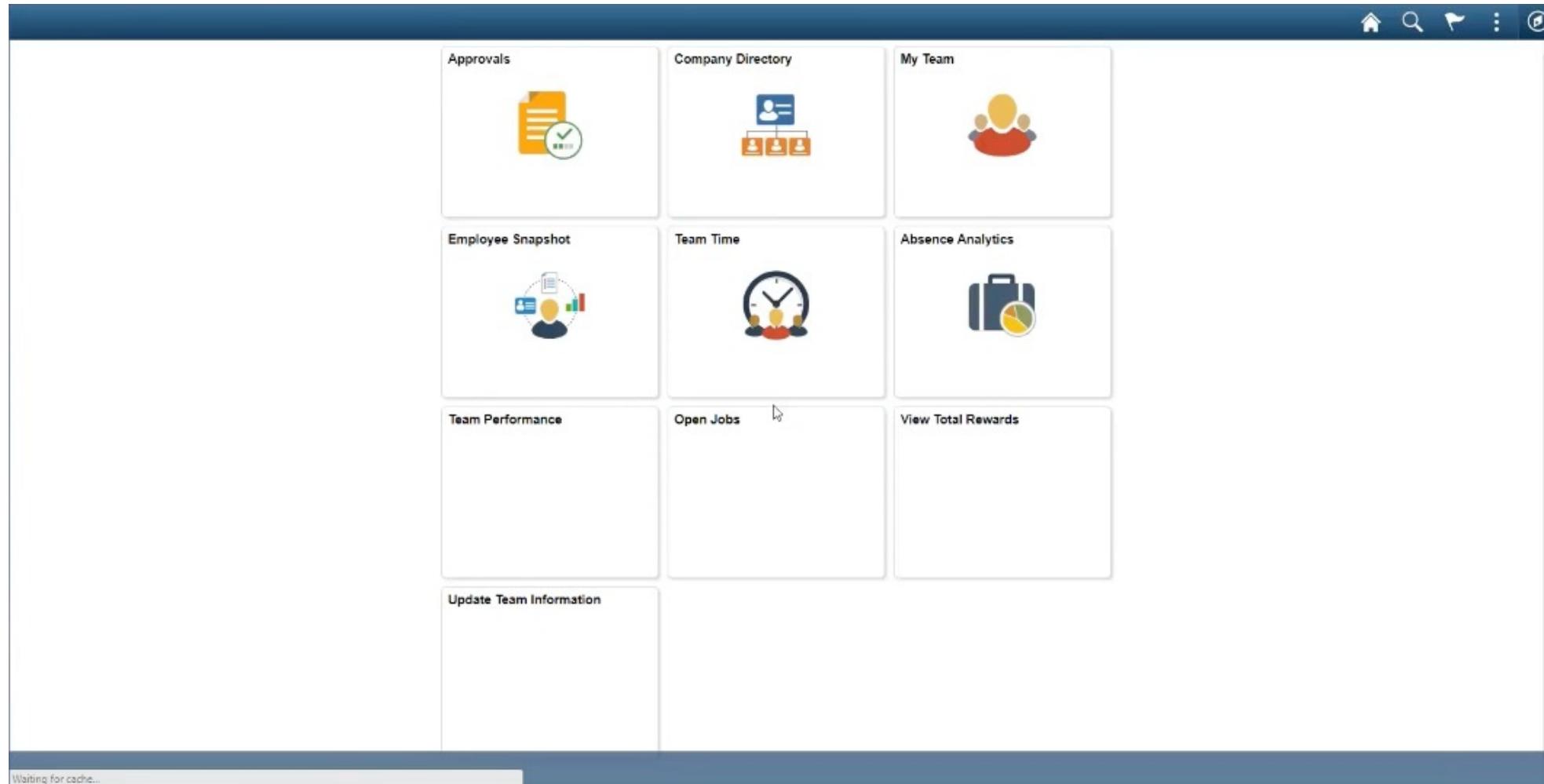
Navigation Dashboards

Nav Collections Changing – Easier to configure, Faster to use

Example:

Time Navigation
Collection is now a
Dashboard

- Tiles for every item in the Nav Collection
- Easy to Add, Move, Remove, Rearrange
- Admins can control:
 - Required Tiles
 - Fixed Location
 - Security Control Access

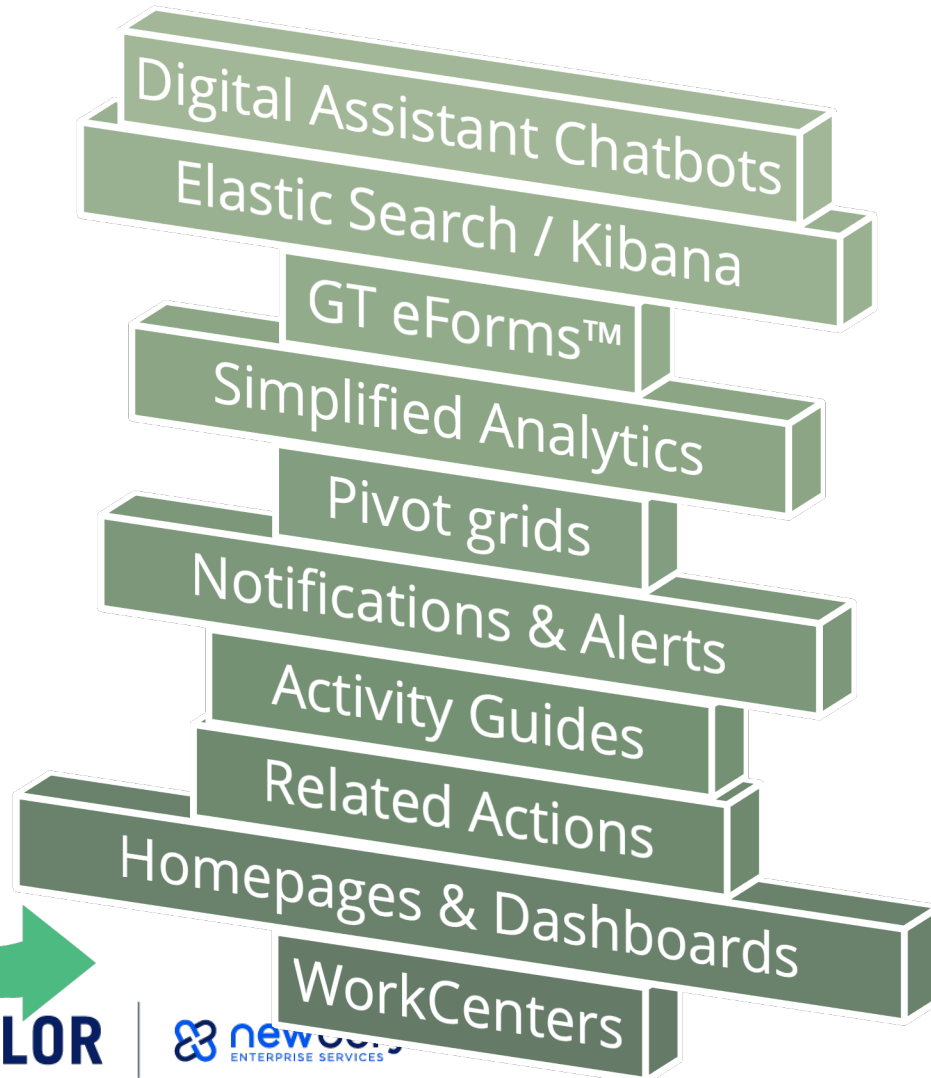


Do you feel like you're in the Query business?

Choose the best tool for the job

Good

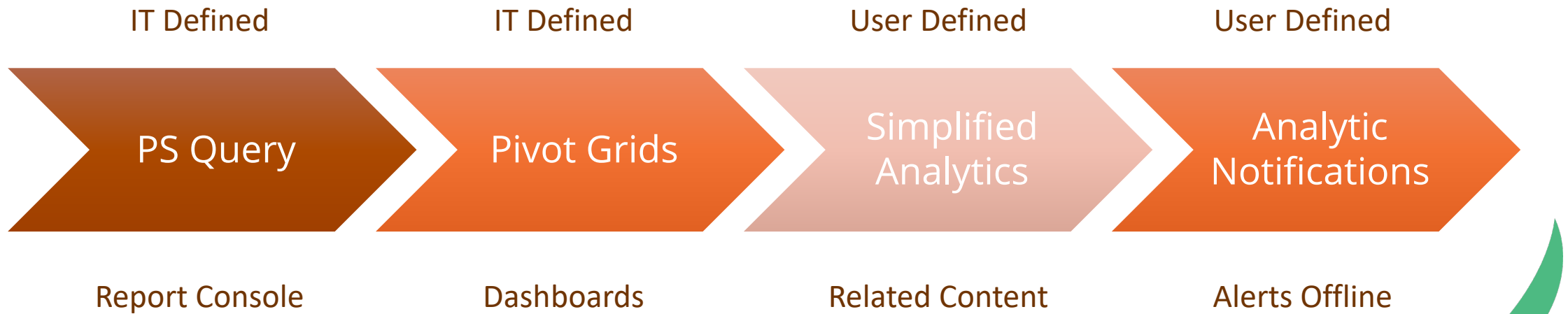
You can help your people find the right information, make the right decisions, and improve their productivity



Lots of great tools and they're all in your belt!

Queries, Analytics, Notifications

The progression of a VERY powerful tool



- Threshold based notifications
- Notify within the app or offline
- Personalized to individual users
- Available for any Pivot Grid analytic
- Released in PT 8.57

Simplified Analytics

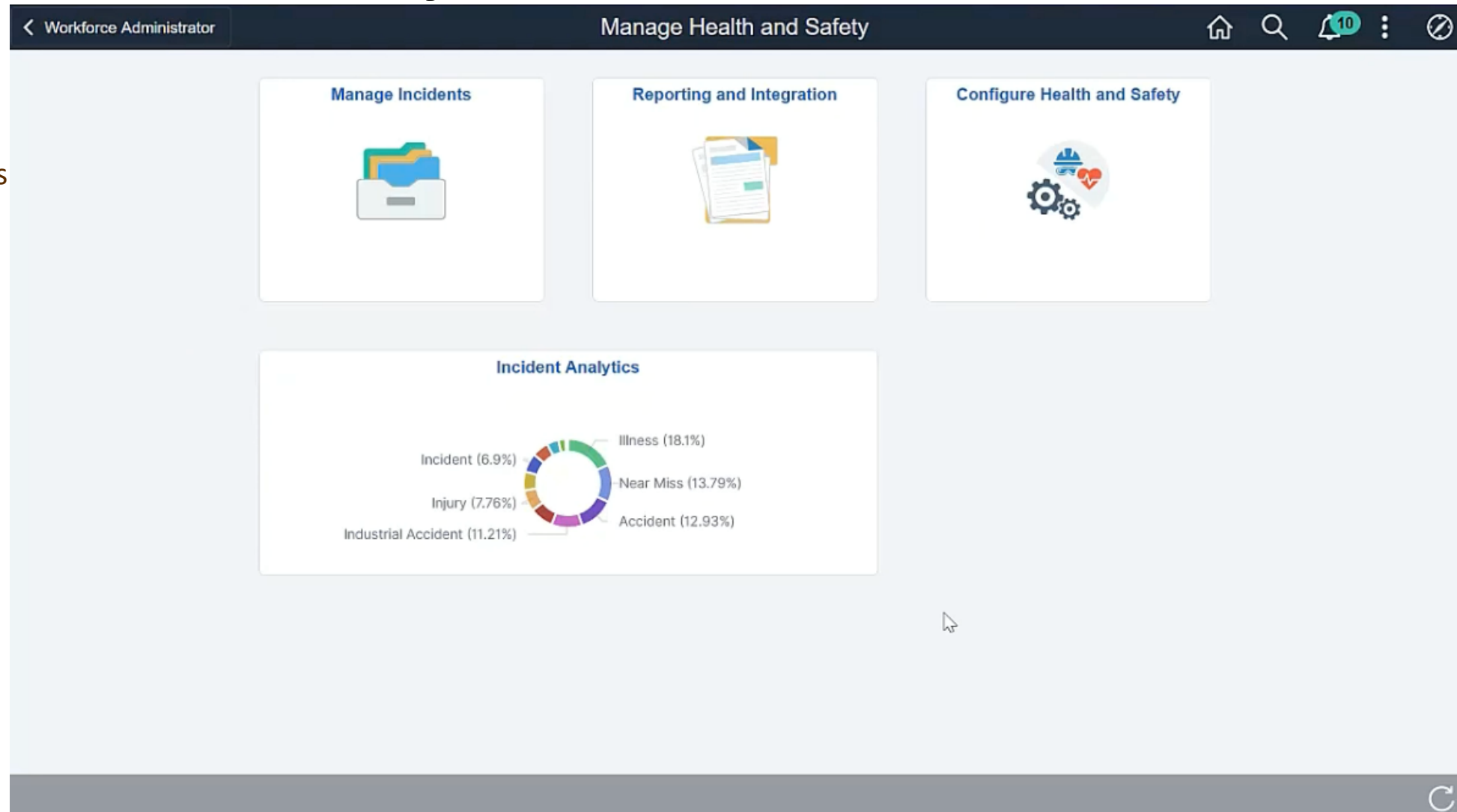
Use data and visuals in the context of other activity

The screenshot displays the Oracle Manager Self Service dashboard. At the top, the Oracle logo is on the left, and the navigation bar includes 'Manager Self Service', a home icon, a search icon, a notification bell, and a settings icon. The dashboard features a grid of 12 analytics tiles:

- Approvals:** Shows a document icon with a checkmark and a count of 0.
- Company Directory:** Shows an organizational chart icon.
- My Team:** Shows an icon of three people.
- Employee Snapshot:** Shows an icon of a person with a bar chart.
- Team Time:** Shows a clock icon and a count of 1 Exception.
- Absence Analytics:** Shows a briefcase icon with a pie chart.
- Team Performance:** Shows a document icon with a bar chart and a count of 23 In Progress Documents.
- Team Profiles:** Shows an icon of three people with a star.
- Open Jobs:** Shows a document icon with a briefcase and a count of 2.
- View Total Rewards:** Shows a pie chart icon with coins.
- Update Team Information:** Shows a document icon with a refresh symbol.
- Recruiting Activities:** Shows a clipboard icon with a checkmark.

A chat icon is located in the bottom right corner of the dashboard area.

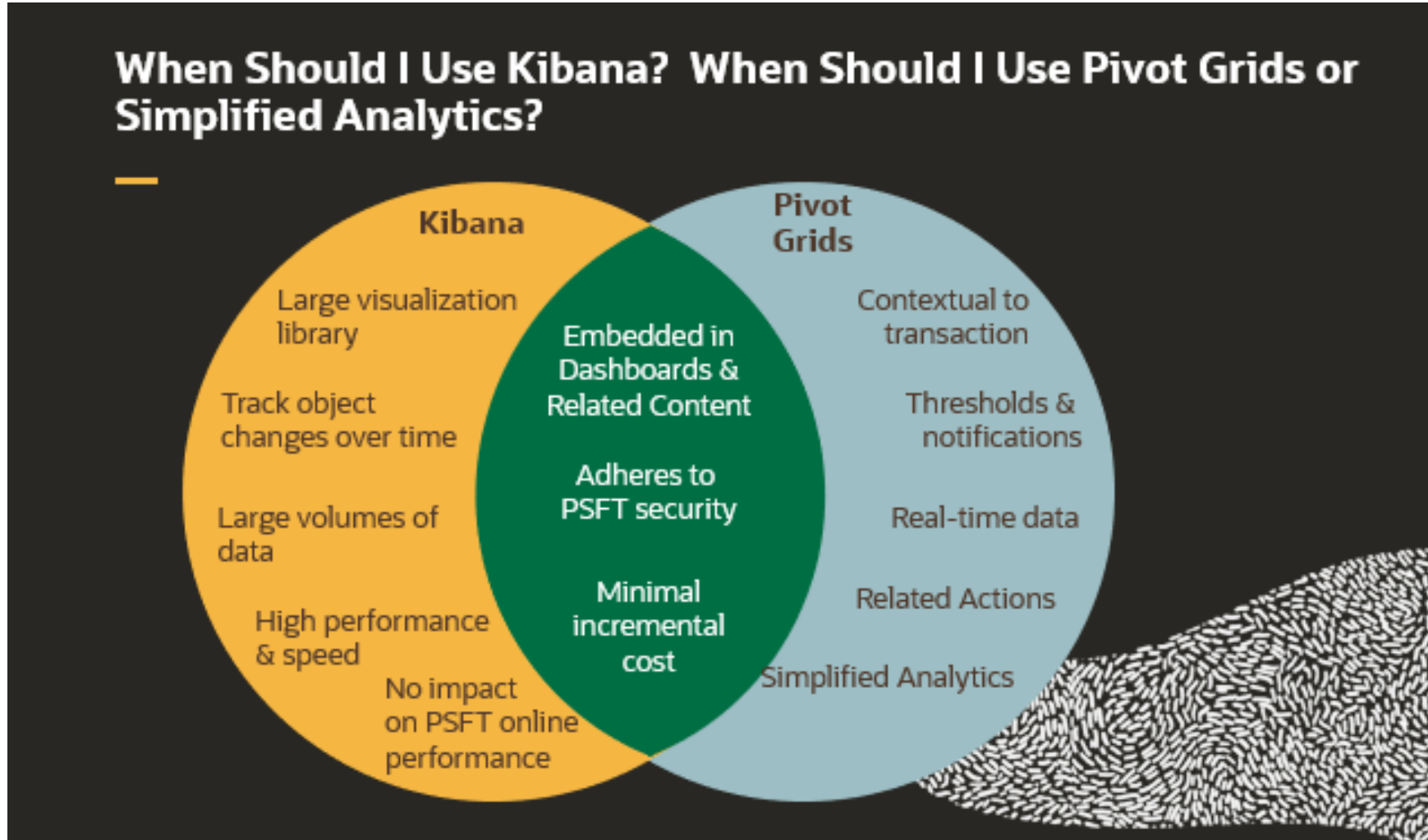
Kibana Analytics / Dashboards



- Orig. PT8.57 for Server Metrics
- PT8.58 for App Data
 - All Search Indexes
 - Dashboards, Tiles, Related Content

Extensive Analytics features
Large Data Volumes
High Performance

Kibana vs. Pivot Grids



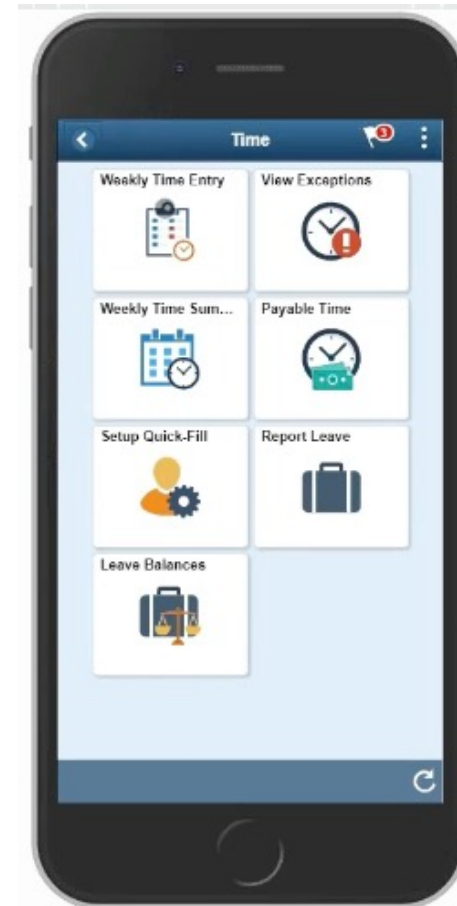
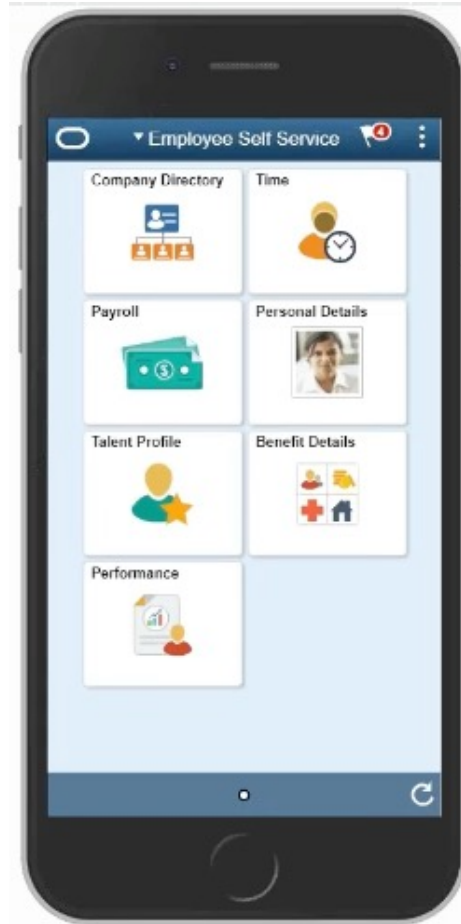
Device Independent Pages

Help Users use their Phone if it's the best tool for the task

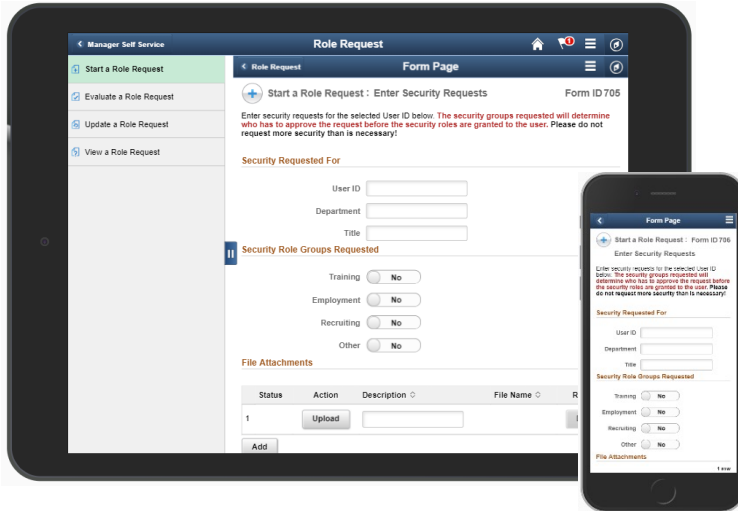
Example:

Fluid Time Sheet

- Design/Layout Changes per reporting type
- Configurable parts
- Admins can control:
 - Default view
 - Role Access



GT eForms™ – Unparalleled Automation



ORACLE
Validated Integration
PeopleSoft

Deliver powerful, custom automation –
any device, anytime, anywhere

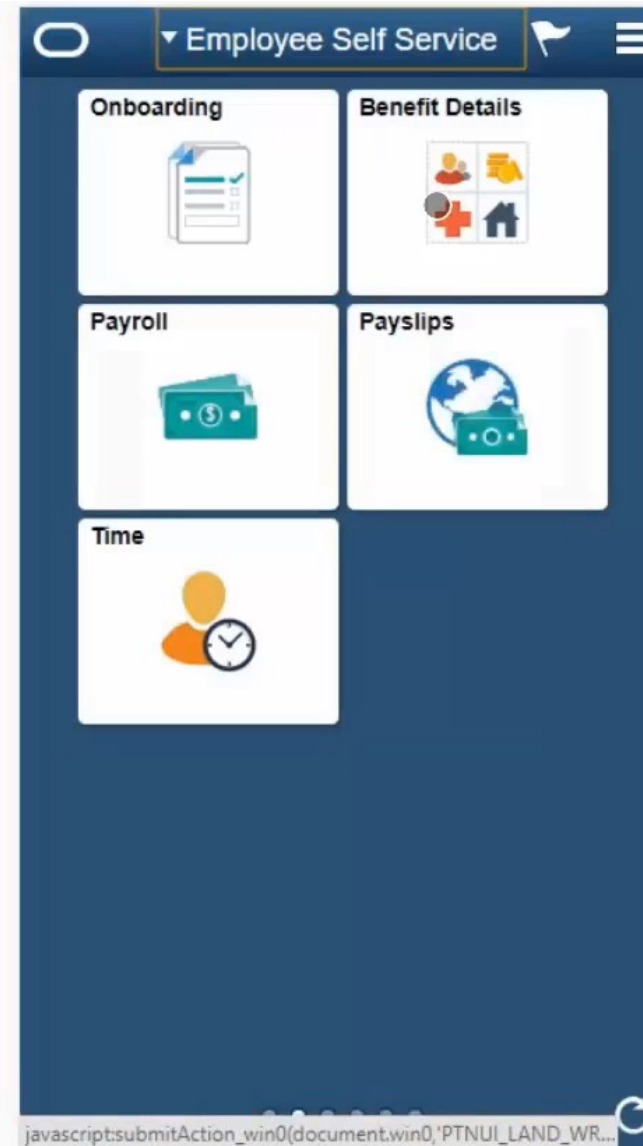
- Oracle-validated, bolt-on electronic forms framework and toolset for PeopleSoft
- Built 100% in PeopleTools – *Familiar toolset for PeopleSoft developers*
- Configuration-based form creation and management with setup tables to control business logic, form actions and routing
- Native, real-time access to PeopleSoft data, including employee, student, and financial data – *no external interfaces to maintain!*
- Leverage existing PeopleSoft workflow, security and infrastructure
- Unlimited flexibility in presentation, pageflow, workflow, and routings
- **MOBILE!** Fully Fluid-enabled to deliver dynamic eForms on any device

Quick and Easy Employee Self-Service with GT eForms

Example:

Veteran Status Declaration Form

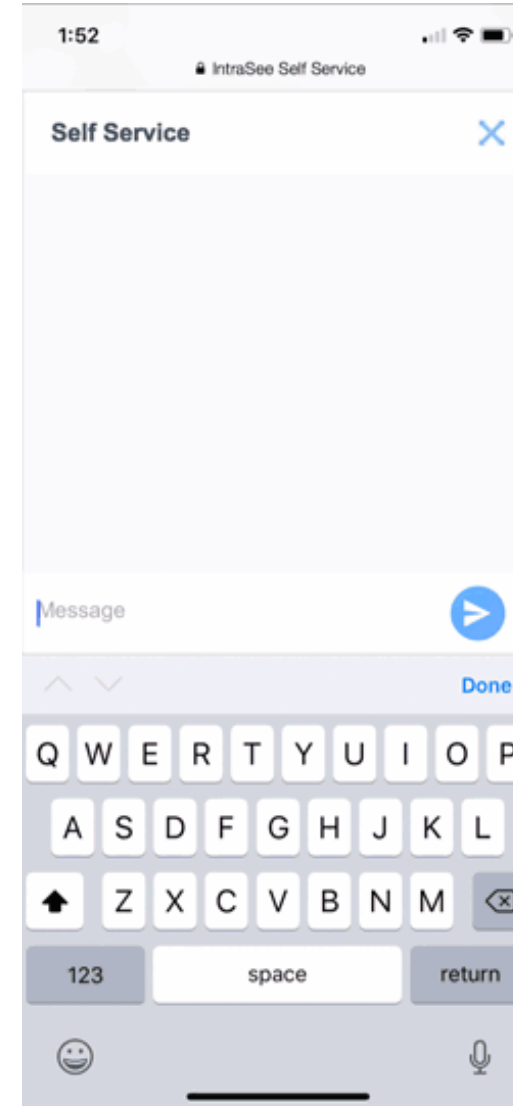
- Custom Fluid eForm
- Entirely configuration – NO DEVELOPMENT REQUIRED
- 45 minutes to create



Meet IntraSee's Ida

PeopleSoft Announces PICASO but Ida goes WAY further!

- Enterprise-grade digital assistant
- Uses machine learning AI
- Scalable to thousands of questions in over 100 languages
- Authenticated and non-authenticated chats
- Multi-channel capable (Web, Teams, SMS, etc)
- Pre-built catalog of questions/skills/integrations
- Conversational satisfaction surveys
- Role-specific & personalized answers
- Automated deployment and testing (no expensive staffing/consulting!)
- AI that gets smarter over time



Where to start?

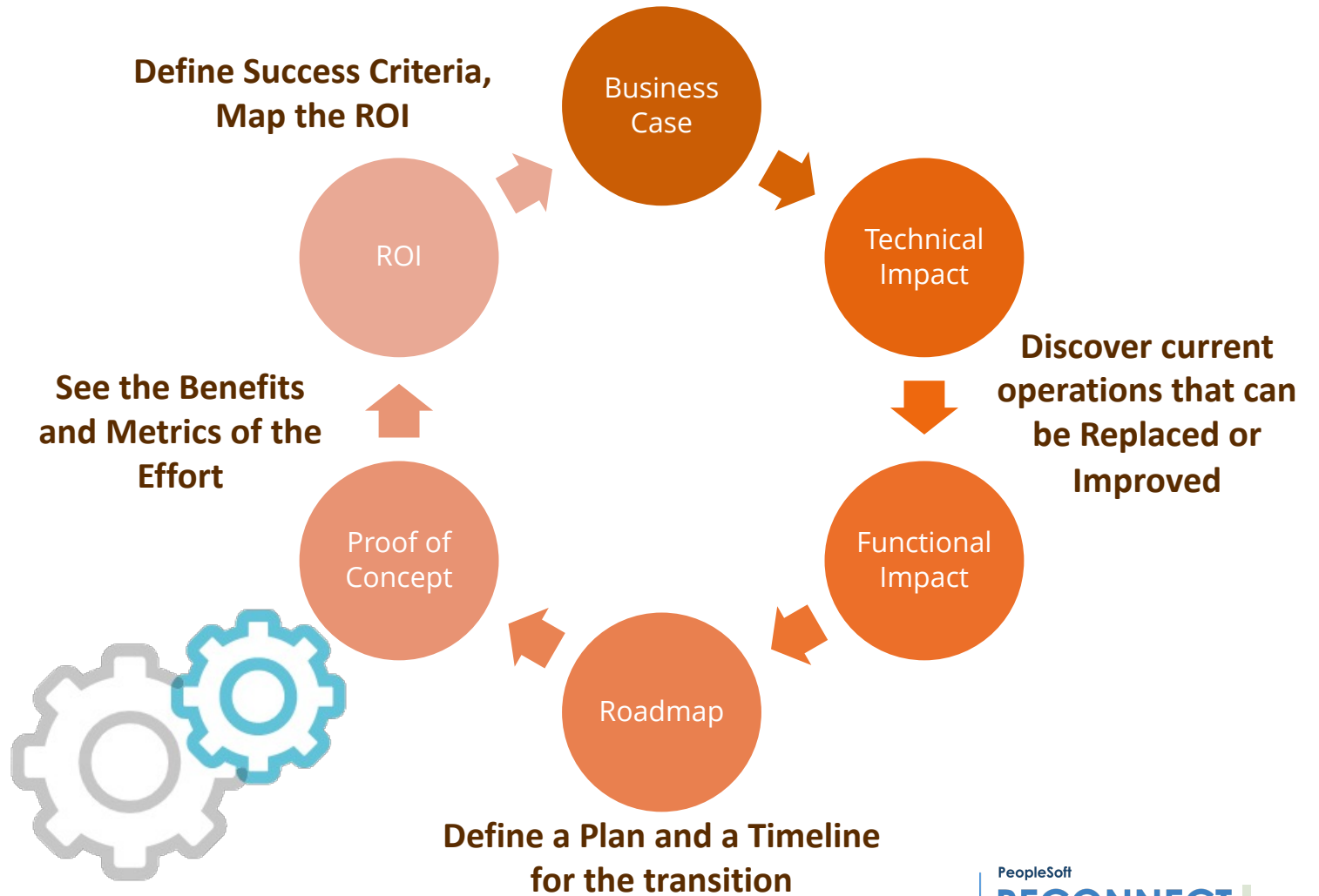
Process Optimization – Impact Assessment

Perform an Assessment so your team can understand

- Business Impact
- Cost, Value & ROI

of Process Optimization

- Review current Operational processes
- Identify opportunities for your teams to improve their metrics
- Leverage available tools, industry best practice
- Deliver Value to the Business



Gideon Taylor 2023 Blueprint Presentation Schedule

Session Name	Session #	Day & Time	Presenter	Co-Presenter	Description
Great Ways for Users to Navigate Today's PeopleSoft	103250	May 8, 4:30PM	Scott Crutchfield		Learn how to quickly leverage delivered functionality to make PeopleSoft efficient, modern and more engaging for users.
Cloud, SaaS, PeopleSoft, and You: Preparing for What's Next	103230	May 9, 10:15AM	Paul Taylor		In today's market, organizations have options on whether/how/when to move to the Cloud.
PeopleSoft in the Cloud: Building a Bridge to What's Next	103240	May 9, 11:30AM	Paul Taylor		It doesn't take an "Oracle" with a crystal ball to tell you that the Cloud is in your future. It almost certainly is.
AI Cage Fight! Gideon Taylor's Ida vs. ChatGPT! (Theater Session in Exhibit Hall)	109430	May 9, 12:35PM	Andrew Bediz	Paul Taylor	OpenAI's ChatGPT has wowed the world, disrupted industries, and inspired millions with fresh ideas of what artificial intelligence can accomplish in the real world.
Move to Cloud, Make Users Happy, Save Money: In What Order?	103270	May 9, 3:30PM	Paul Taylor		When starting a digital transformation, it is best to know why you're doing it. Is moving to the Cloud a means to an end, or an end in itself?
Prologis is Totally Owing PeopleSoft Workflow (and you can too!) Building custom eForms to Transform the Supplier Self-Service Experience	103200	May 10, 11:15AM	Kyle Hupf	Paul Taylor	Have you ever wondered if there was a better way to include someone outside your organization in your PeopleSoft workflow?
5 Great Ways to Supercharge PeopleSoft	103110	May 10, 4:00PM	Scott Crutchfield		Hang on to your hats! You're in for a quick spin around some of the greatest features PeopleSoft has to offer. If you're not using them already, you really should be!

PeopleSoft

RECONNECT

AT BLUEPRINT4D

LIVE!

Contact me:

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103250



Quest
PeopleSoft
Community

At Quest, you belong.

Swap stories, ask questions, find answers, and learn from other Oracle users.

Quest Helps: Individuals

- Increase their personal knowledge, skills, and efficiency.
- Find answers and solve problems.
- Make better, informed decisions.
- Increase their sphere of professional influence and advance their careers.

Quest Helps: Companies

- Become more efficient in their use and deployment of Oracle products.
- Transform their organizations and modernize their product planning.
- Recognize opportunities for efficiency gains and cost savings.

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